

Tax (Financial) Adviser

Start today
1300 738 955



5 star education experience

- ★ Tax Practitioners Board approved courses
- ★ Qualified trainers with extensive law and tax experience
- ★ Engaging and carefully structured course materials
- ★ Quality textbooks written by expert industry practitioners
- ★ Professional development essential for your career

*Education for
the real world*

RTO Code - 22530

Tax (Financial) Adviser approved education *essential for your TPB registration*

All Australian financial services (AFS) licensees, their employees and representatives who provide tax (financial) advice services for a fee or other reward must be registered with the Tax Practitioners Board.

Monarch Institute is registered with the Tax Practitioners Board (TPB) as an approved course provider for the required course in Australian taxation law and the course in commercial law for Tax (Financial) Advisers.

To satisfy the TPB education requirements for your Tax (Financial) Adviser registration, it's essential that you have completed these Board approved courses.

What does Monarch's approved *Tax (Financial) Adviser course cover?*

Monarch's TPB approved courses meet the requirements of the Tax Practitioners Board for :

- **Australian Taxation Law**
- **Commercial Law**

Australian Taxation Law

To attain the knowledge you need to identify a client's circumstances and to provide tax (financial) advice you'll study Australian Taxation Law.

In this unit you'll gain a solid understanding of key taxation concepts and calculations as they apply to individuals and organisational legal entities as well as the regulatory and ethical obligations of tax (financial) advisers.

The key topics covered are:

- Tax treatments for individuals
- Concepts of income (assessable and exempt), deductions, tax offsets, tax losses
- Tax treatment for entities such as trusts, partnerships, companies, superannuation funds
- Capital gains tax
- Fringe benefits tax
- Goods and services tax
- International taxation
- Tax administration including assessments, amendments, objections and compliance
- Tax planning and anti-avoidance provisions
- Ethical and professional regulation of Tax (Financial) Advisers including obligations under the TASA and TASR

Commercial Law

Law underlies every aspect of your role as a tax (financial) adviser. To be proficient in servicing your clients, this unit provides an essential understanding of the key contract, consumer, corporations and trust laws.

Also included is crucial knowledge of how the law applies to business structures including companies, trusts, associations and superannuation funds. As well, you'll gain the essential knowledge of directors' duties.

The key topics covered are:

- Framework of the Australian legal system
- Introductory contract law
- Contract formation, validity and performance
- Fundamental legal concepts of business organisational structures
- Aspects of the law of torts, especially negligence and negligent misstatement
- Key provisions of the Competition and Consumer Act, particularly those relating to misleading and deceptive conduct.
- Negligence and risk
- Business structures
- The Company – a separate legal entity and its regulation
- Directors duties
- Trusts and associations.



Course outline

The Tax (Financial) Adviser course covers Australian taxation law and commercial law.

Monarch's TPB approved course comprises two units:

Australian Taxation Law

MTLTFA Taxation law for tax (financial) advisers (equivalent to FNSTPB506)

Commercial Law

MCLTFA Commercial law for tax (financial) advisers (equivalent to FNSTPB507)

For each unit there is an easy-to-read text book, written by experts, specifically covering the required topics for each of these units.

Monarch Institute is accredited

Monarch Institute is licensed as a Registered Training Organisation (RTO 22530) under the Australian Skills Quality Authority (ASQA), which is an Australian Government statutory body regulating nationally recognised training.

Study anywhere and anytime you choose

Online/Self paced - maximum flexibility

- Start anytime, study anywhere, at your own pace
- Ongoing support from your qualified Trainer/ Assessor via phone and email from Monday to Friday.

Course duration

Most students would complete this course within 6 months. Your completion time frame depends on your previous education, work experience, time availability and work rate.

We consistently receive feedback from our students telling us that Monarch's courses are very well structured and easy to follow.

Essential education for your financial adviser career

Monarch's approved Tax (Financial) Adviser course provides the education essential for your registration with the Tax Practitioners Board.

All Australian financial services (AFS) licensees, their employees and representatives who provide tax (financial) advice services for a fee or other reward must be registered with the Tax Practitioners Board. If this includes you, then you're almost certain to have to successfully complete TPB approved courses in Australian taxation law and commercial law to be able to maintain your registration and to continue your adviser career.



Why choose Monarch?

- TPB approved courses in Australian Taxation Law and Commercial Law
- Dedicated support from qualified trainers
- Clear and concise course materials
- A student online portal that's easy to navigate
- Friendly and efficient student support team



Assessments

You are required to complete a variety of assessment tasks demonstrating your skills and knowledge. These include:

- Multiple choice questions
- Short answer questions
- Scenario based questions
- Calculation exercises
- Short exam for each of Australian taxation law and commercial law.

What are the entry requirements?

There are no entry requirements, just your drive, motivation and passion for the industry.

Will my previous experience or study count?

Monarch Institute will recognise your previous educational results for equivalent units by allowing Credit Transfer.

Recognition for Prior Learning (RPL) for other education which is not directly equivalent to the approved course units must be referred by the student directly to the Tax Practitioners Board.

If you have completed, or plan to complete, a course or unit that does not appear on the TPB's list of approved courses and wish to know whether this course or unit will be accepted by the Board, please contact the TPB directly. For further information refer to www.tpb.gov.au

Course costs

Monarch Institute's courses are competitively priced. Check our website for the most up-to-date prices at www.monarch.edu.au/courses or call us on 1300 738 955.

Enrol today

Secure your on-going career as a Tax (Financial) Adviser and enrol in Monarch's TPB approved Tax (Financial) Adviser course today!



To discuss the course that's right for you call us on
1300 738 955



To find out more information email us at
info@monarch.edu.au



To enrol, visit our website
www.monarch.edu.au